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Call Center Supervisor Guide

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Call Center Supervisor Guide

Call Center is an application that handles incoming calls as efficiently and economically as possible. Call Center answers calls, then routes the calls to agents in a skillset that most closely matches the needs of the caller. If there are no agents available, the calls are placed in a skillset to wait for an appropriate agent. Waiting callers receive periodic announcements and informative messages.

This guide describes how you can use Call Center features as a supervisor or an agent. For more information about Call Center agents, refer to the *Call Center Agent Guide*. For information about Call Center administration, refer to the *Call Center Set Up and Operation Guide* and the *Call Center Reporting Set Up and Operation Guide*. For information about Multimedia Call Center, refer to the *Multimedia Call Center Set Up and Operation Guide* and Multimedia Call Center Agent Help.

Logging on to Call Center

You can log on as a supervisor to silently monitor or participate in calls between agents and callers. You can also log on to a skillset as an agent to have calls routed to you. Check with your Call Center Administrator to make sure you are set up as a supervisor. You must use a two-line display telephone. Your telephone must have handsfree/mute capability. To monitor calls with your voice muted, your telephone must have the handsfree/mute feature programmed.

What agents should log on to

The Call Center Administrator assigns what type of calls agents can receive. The type of calls agents can receive determines whether they must log on to a telephone, Multimedia Call Center or both. This table shows what capabilities agents have depending on the call types they can receive.

Tell your agents what they must log on to, depending on the type of calls they can receive.

Type of calls you can receive	Are you logged onto a telephone?	Are you logged onto Multimedia Call Center?	Can you have voice calls?	Can you have phone and browser Multimedia Call Center calls?	Can you have browser only Multimedia Call Center calls?
Voice	No	Not permitted	No	-	-
	YES	Not permitted	YES	-	-
Multimedia Call Center	No	No	-	No	No
	No	YES	-	No	YES
	YES	No	-	No	No
	YES	YES	-	YES	YES
Both	No	No	No	No	No
	No	YES	No	No	No
	YES	No	No	No	No
	YES	YES	YES	YES	YES

Using Feature Codes

Call Center agents and supervisors use Feature Codes to access Call Center features. The default Feature Codes are shown below. Your Call Center Administrator can program Custom Feature Codes that you use instead. If you use Custom Feature Codes, you can record them in the space provided below. Tell the agents what the Custom Feature Codes are.

Feature	Default Feature Code	Custom Feature Code
Open mailbox	[*] 9 8 1	[*] 9 ____
Log on/Log off/Silent Monitor calls	[*] 9 0 4	[*] 9 ____
Not Ready	[*] 9 0 8	[*] 9 ____
Display Waiting Calls	[*] 9 0 9	[*] 9 ____

You can program these Call Center Feature Codes to memory buttons:

- Log on/Log off/Silent Monitor agent calls [*] 9 0 4
- Display calls waiting in a skillset [*] 9 0 9
- Take some Not Ready time [*] 9 0 8

For how to program a Feature Code to a memory button refer to [“Programming a memory button” on page 11](#).

Monitoring call activity

There are two ways that you can monitor call activity at your call center:

- “Silently monitoring agent calls” on page 5
- “Monitoring skillsets” on page 9

You can monitor calls by using memory buttons that you program with the Feature Codes for monitoring:

- Display calls waiting in skillsets
- Monitor agent calls

For how to program a memory button, refer to “Programming a memory button” on page 11.

Silently monitoring agent calls

When you monitor calls, you are a Silent Monitor: you are not detected by the agent or callers. You monitor all of the calls on an agent's telephone, rather than on a call-by-call basis. When the current call is completed, the monitoring session of the agent continues. You do not have to reestablish the monitoring session.



Note: While you monitor an agent's calls you monitor all of their calls. This includes their personal calls and if they access their voicemail. Tell agents that if they make a call that they do not want monitored, they must first log off as an agent, then log on again when they complete the call.

Use to log on to Call Center and the skillsets you are assigned to, and to monitor calls. You can program a memory button with . If the memory button you choose has an indicator, the indicator shows your log on status.

- If the indicator is off, you are not logged on.
- If the indicator is on, you are logged on.

Using Silent Monitor with Answer DN

If you have an Answer DN programmed for your main telephone, and you are using Silent Monitor from your main telephone the telephone that you have programmed as your Answer DN telephone rings briefly when:

- you monitor an agent who is not on a call, and the agent answers or places a call
- you start to monitor an agent who is on an active call
- you monitor an agent who puts a call on hold and answers another call or unholds the original call.

Use a headset to monitor calls

Use a headset rather than handsfree when you monitor calls. This ensures call privacy and reduces the office noise level. The headset must be plugged into the headset port on the bottom of the telephone. If you pick up the handset when the headset is plugged in, the handset does not work. Check with your Call Center Administrator to make sure you can use a headset with your telephone.

Monitoring tips

- More than one supervisor can log on to the same skillset.
- An agent can be monitored by only one supervisor at a time.
- While you are on a call, do not initiate a monitoring session.
- Use the headset when monitoring calls. If you use a handset you cannot join a call while you are monitoring it.



Note: You cannot monitor an agent who is:

- on a conference call
- using an Answer DN
- on an ISDN or Companion set
- on any type of call if the maximum number of conference bridges are being used

Multimedia Call Center Calls that do not have a PSTN component do not appear in Call Center Reporting.

If a Multimedia Call Center agent logs on to their set but does not log onto their computer, the agent appears as logged on to the Call Center, but does not receive any calls. To check whether agents are taking calls, you can view their view their status during a monitoring session.

Logging on and monitoring agent calls

- 1 Press    .
- 2 Enter your Agent ID number and press **OK** or .
- 3 Enter your password and press **OK** or .
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you enter the default password, you must change your password. Enter a new password from four to eight digits long and press **OK**. Enter your new password again and press **OK**.
- 4 Press **CHNG** until **Supervisor: Y** appears. You must log on as a supervisor to monitor and participate in calls.
- 5 Press **OK** to accept supervisor status.
If you want to log on as an agent, press **CHNG** until **Supervisor: N** appears, then press **OK** to log on as an agent. If you log on as an agent, calls are routed to you but you cannot monitor calls.
- 6 Press **IN** to log on to one or more skillsets that you want to monitor. You can monitor only the agents who are logged on to the same skillset as you. If **IN** does not appear, you are already logged on to all the skillsets or there are no skillsets available.
- 7 Press **CHNG** until the skillset you want to log on to appears on the display. The skillsets that are available are the skillsets that are assigned to you. If there is only one skillset available to log on to that you are assigned to, you are automatically logged on to that skillset.
- 8 Press **OK**. The display briefly confirms the skillsets that you are logged on to.
- 9 Press **NEXT**.

- 10 Press SUPER to monitor an agent. Calls are not routed to you.
- 11 Press OK to accept the skillset shown or press NEXT or PREV to find the skillset you want to monitor.
- 12 Enter the Agent ID of the agent you want to monitor and press OK.
Invalid Agent appears if the agent is not assigned to you.
You can press DIR to find the Agent ID in the Agent directory. You can monitor any agent that is in a skillset assigned to you.
- 13 Press INFO to display the Agent ID number, agent name, call state and the time in minutes and seconds that the call has been in this state. Call states include Idle, Not Ready, and Break (Incall Outcall).
- 14 Press INFO a second time to display the Agent ID number, agent name, and monitoring options again.
- 15 Press OBSV to monitor an agent. At any time you can press the CANCL button if you want to exit the monitoring session without logging off.
If the agent has a call on hold or is on a conference call, you do not begin to monitor the agent until the agent takes the call off hold or ends the conference call.
- 16 If you want to join the call, press the **Intercom** button.
- 17 To end the monitoring session press CANCL.
If you want to monitor another agent in the skillset press NEXT until you see the agent you want to monitor, and then press OBSV.

About monitoring sessions

Receiving a call on your telephone	If you are monitoring an agent and you get a call on your telephone, the monitoring session ends if you answer the call. When you end your call, you can press <u>DESV</u> to reenter the monitoring session with the agent.
Making a call while monitoring	If you make a call while you are monitoring an agent, the monitoring session ends and you must log in again to reestablish a monitoring session.
Ending a session by logging off	The session ends if you or the agent are forced to log off or if the agent logs off voluntarily.
Conference calls	If the agent puts the call into a conference call while you are monitoring the agent, for the duration of the conference call, you are disconnected from monitoring the call. When the call goes out of conference, you are automatically monitoring the call again. NOTE: If you want to monitor agents 100% of the time, ask agents not to participate in conference calls.
On hold calls	If the agent puts a call that you are monitoring on hold, your monitoring session continues while the call is on hold. When the agent resumes the call, you are still monitoring the call. If an agent puts one call on hold and answers another call, you can monitor only the currently active call. When the agent switches back to the first call, this becomes the active call that you are monitoring.
Using VoIP telephones	Do not monitor agents who use VoIP telephones. If you monitor an agent who uses a VoIP telephone, a noticeable noise can be audible for several seconds when you begin to monitor a call.
Companion sets	You cannot monitor agents who are logged on to Companion sets.
ISDN sets	You cannot monitor agents who are logged on to ISDN (Integrated Services Digital Network) sets.
Maximum number of conference bridges	If the maximum number of simultaneous conference bridges are being used, when you try to start a monitoring session your display shows "Observe Failed".
Transferred calls	If you are monitoring an agent and they transfer a call, you do not continue to hear the call until the transferred call is answered.

Monitoring skillsets

Use 9 0 9 (Display Waiting Calls) to view information about skillsets and the calls waiting in skillsets. Display Waiting Calls lets you know when a skillset in your call center gets very busy. You can then ask qualified agents to log on to the busy skillset. This table describes the information in each display.

Display	Description
Skill 1: Enabled	shows the skillset number and the status of the skillset. The status can be Enabled, Disabled or Uninit (uninitialized).
1: 6 agents	shows the skillset number and how many agents are currently logged on to the skillset
1: 10 calls	shows the skillset number and the number of calls waiting in the skillset
1: wait 9:45	shows the skillset number and the time of the call waiting longest in the skillset.

To monitor skillsets

- 1 Press 9 0 9 .
The skillset display for skillset 1 appears.

On a one line display telephone press	On a two line display telephone press	To
1	1 or <u>GOTO</u>	enter the number of the skillset you want to monitor
2	2 or <u>SKILL</u>	monitor the next enabled skillset
3 or 6	3 or 6 or <u>NEXT</u>	go to the next skillset
4	4 or <u>PREV</u>	go to the previous menu
#	#	go to the next menu
*	*	cancel the session
		exit

Using a memory button to monitor calls waiting in skillsets

Program a memory button with 9 0 9 to view the status of all skillsets, including the skillsets you are logged on to. If the memory button you choose has an indicator, the indicator shows information for the calls for the skillset you are logged on to.

- If the indicator is off, all of the calls are within the acceptable wait time.
- If the indicator is flashing slowly, at least one call has exceeded the first alert time.
- If the indicator is flashing quickly, at least one call in the skillset has exceeded the second alert time.
The Call Center Administrator sets what the wait times are.

Taking some Not Ready time

If you use **[*] 9 0 8** (Not Ready), you do not receive calls. The Call Center Administrator can program a Break Time, which makes Call Center automatically wait a short time before it routes the next call to you. You use the Break Time to complete any tasks, such as paperwork, required by the last call. If you need some additional time, use Not Ready to prevent Call Center from routing another call to you. Do not use the Do Not Disturb feature. You can use Not Ready while a call is ringing on your telephone. The call that is ringing on your telephone goes back to the skillset. You can program a memory button with an indicator instead of pressing **[*] 9 0 8**.

For how to program a memory button, refer to [“Programming a memory button” on page 11](#).

Using Not Ready

- 1 Press **[*] 9 0 8**. **Make Not Ready** appears on the display.
If you press **[*] 9 0 8** and **Break canceled** appears on the display, you canceled the Break Time that the Call Center Administrator programmed for you. You must press **[*] 9 0 8** again to activate the Not Ready feature.
If you press **[*] 9 0 8** and **Agent active** appears, the Not Ready feature was on and you canceled it. Press **[*] 9 0 8** again to activate Not Ready.
- 2 When you are ready to take calls again, cancel the Not Ready feature by pressing **[*] 9 0 8**.
If **Not ready** appears, press **[*] 9 0 8** again.
Not Ready is automatically enabled if you do not answer your telephone, and if this option is configured in Call Center.

Programming Not Ready to a memory button

You can have convenient, one button access to Not Ready if you program a memory button with the Not Ready Feature Code. If the memory button you choose has an indicator, the indicator shows your busy status:

- If the indicator is off, Not Ready is off.
- If the indicator is on, Not Ready is on.
- If the indicator is flashing, the Break Time feature is on.

For how to program a memory button, refer to [“Programming a memory button” on page 11](#).

Logging off

Log off when you complete your shift or will be away from your telephone for an extended period.

1. From the display that shows your name on the top line, press **OUT**. The date and time display appears.
If **OUT** does not appear, you are not logged on to any skillsets.

Programming a memory button

You can program memory buttons for one-touch access to Call Center features. We recommend that you program memory buttons for the Log on  9 0 4, Not Ready  9 0 8 and, optionally, the Display Waiting Calls  9 0 9 features. You cannot assign features to Line, Intercom, Answer or Handsfree/Mute buttons.

Programming a feature to a memory button

- 1 Press  * 3.
- 2 Press the memory button that you want to program.
- 3 Press  and enter the feature code.

Use the paper labels that come with your telephone to identify the programmed button. To use the Feature Code, press the labeled button.

Memory button indicators

Memory button indicators are triangular icons (▶) that appear beside some memory buttons. If you program Call Center features on memory buttons with indicators, the indicators show additional information about the feature.

Changing your supervisor password

Keep your password confidential. Change your password regularly, about every 30 days.

- 1 Press  9 0 4.
- 2 Enter your Agent ID number and press OK.
- 3 Enter your password and press OK.
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you use the default password you must change your password.
- 4 Press OK to accept supervisor status, or press CHNG and then OK to log on as an agent.
- 5 Press IN to log on to one or more skillsets.
If IN does not appear, you are already logged on to all the skillsets or there are no skillsets available.
- 6 Press CHNG until the skillset you want to log on to (All, or a number) appears on the display.
If there is only one skillset available to log on to that you are assigned to, you are automatically logged on to that skillset.
- 7 Press OK.
- 8 Press NEXT.
- 9 From the Supervisor display, press ADMIN.
- 10 Enter a new password from four to eight digits long and press OK.
- 11 Enter your new password again and press OK.
- 12 Press .

Checking skillset mailboxes for messages

Frequently check skillset mailboxes for messages. Only one person at a time can retrieve messages from each skillset mailbox. If different people access the messages in the skillset mailbox throughout the day, each person should:

- listen to the message
- write down what the message says
- erase the message
- return the caller's telephone call

If the caller is not available, the agent can try again later or give the message to another agent. If only one agent retrieving the messages at your call center, this agent does not need to transcribe and delete each message before callback. This agent handles messages and knows the status of the old messages.

Playing messages in a skillset mailbox

- 1 Press  9 8 1 .
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.
- 2 Press **PLAY** or  to listen to your messages.
For other options, refer to the user card for your telephone, the *CallPilot Reference Guide*, or the *Call Center Set Up and Operation Guide*.
- 3 Press  to end the session.

Updating web page lists for Multimedia Call Center agents

Multimedia Call Center agents send web pages to callers. If the list of web pages is updated, make sure you know where the new list is and tell the agents to update their Favorites. For information on how to update and distribute web page lists, refer to the *Multimedia Call Center Set Up and Operation Guide*. For information on how agents update their Favorites, tell the agents to refer to the Multimedia Call Center Agent Help.

Features that logged on agents can use

Call Transfer

Agents can use Transfer to transfer a call to another agent, another person such as a subject matter expert, or send the call back to a skillset. We recommend that agents use Transfer rather than Call Park or Call Pickup.

- If the agent wants to send the call to a specific agent or another person, the agent can enter the Transfer Feature Code (**[*] 7 [0]**) and enter the extension number.
- If the agent wants to send the call to a skillset, the agent can enter the Transfer Feature Code (**[*] 7 [0]**) and enter the CDN of a skillset to send the call to a skillset.
- If you are monitoring an agent and they transfer a call, you do not continue to hear the call until the transferred call is answered.

Call Forward

Advise agents not use Call Forward. An agent who uses Call Forward is automatically logged out or made auto busy, depending on their agent settings.

Answer DN

The only way agents should use Answer DN is if they program their portable set to be the Answer DN for their main telephone. You cannot hear calls that agents answer on their Answer DN. You can only hear calls that agents answer from the set they are logged on to. For more information about using Answer DNs with Call Center, refer to the *Business Communications Manager 3.0 Programming Operations Guide*.

If an agent uses their Answer DN telephone to answer a call that is transferred to them, Call Center does not recognize the agent as being busy, and still sends calls to the agent's main set.

Do Not Disturb

Instead of using Do Not Disturb, agents can use the Not Ready Feature Code (**[*] 9 [0] 8**).

If agents use Do Not Disturb they are automatically logged out or made not ready.

Call Forward No Answer

When an agent's phone is on Call Forward No Answer to the voicemail extension, the number of rings for Call Forward No Answer must be less than the number of rings for Transfer Callback Timeout.

Multiple calls

Agents can handle multiple calls, but only one call at a time can be active. If an agent has multiple calls, the agent does not receive any new calls from a skillset until the agent completes the multiple held and active calls. The agent can still receive Answer DN or transfer calls.

Follow-me browsing (Multimedia Call Center agents only)

Follow-me browsing does not work with embedded Flash animations. If an agent clicks a Flash button, the image that is sent to the agent is not displayed to the caller.

Tell agents that if the page they are sending to the caller contains Flash animations, they must tell the caller to display the page by, for example, clicking the Next button, or telling them what item to click on a page to display the next page.